

**This work instruction was last updated: 31<sup>st</sup> March 2010**

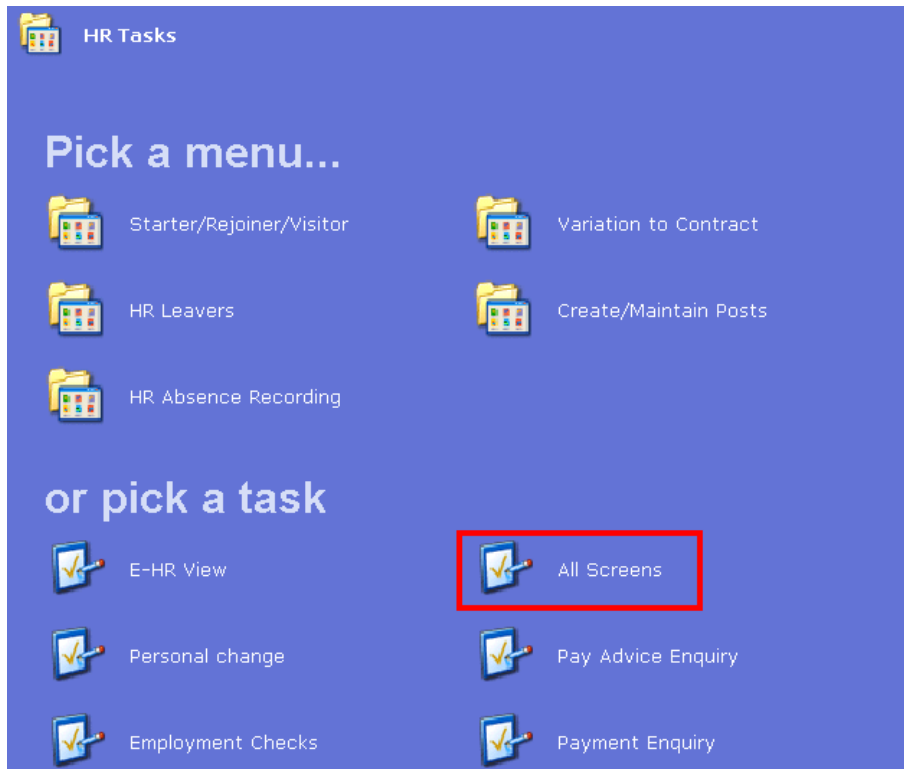
## **Overview of the All Screens**

This Work Instruction provides a brief overview of what each of the screens within the **All Screens** task can be used for.

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## 1 Getting Started - All Screens Task

### 1.1 HR – Schools/PSD Access - All Screens task



### 1.2 Click on the task the **All Screens** task.

### 1.3 The following search form is made available

The screenshot shows the 'Task - HR2/Additional Increments - Employee Selection Screen'. The form has tabs for 'Employee', 'Other Numbers', 'Structure', 'Saved List', and 'Employment'. The 'Employee' tab is selected. The form contains several input fields: 'Employee Number', 'Surname', 'Initials', 'Sex', 'Nat. Ins. No.', 'Current Employee', 'As at Date', 'Previous Surname', and 'Known As'. There are 'Add' and 'Search' buttons. Below the input fields is a table with columns: Surname, Inits, Title, Emp Number, National ID Number, Start Date, and For. At the bottom, there are 'Select', 'Exit', and 'Save List' buttons. The status bar at the bottom shows 'Enter an Employee Number', 'CHANGE', 'NUM', and 'MD55322'.

- 1.4 The Employee Number, Surname, search and select options are highlighted
- 1.5 Entering either the Employee Number or Surname select search.
- 1.6 Select the appropriate staff member from the list

## 2 The All Screens task – Overview of the Different Screens


2.1 The **All Screens** task contains many screens. Here is a brief overview of what each screen can be used for:

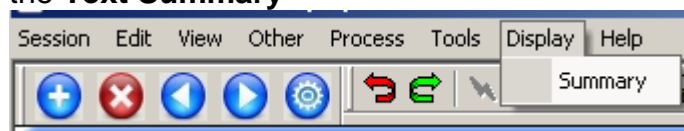
Screen:	Overview:
<b>Personal Details</b>	Contains: Title, Forename, Surname, Previous Surname, Known As name, Gender, Date of Birth, National Insurance Number, Home Address, Contact Telephone Number(s), Email Address, Marital Status and Pay Point (held within "User Fields").
<b>Fixed P.E. Summary</b>	Contains: All fixed (i.e. regular) aspects of an employee's monthly pay package. This includes the Employee's Basic (Monthly) Pay, Employee's Tax Contributions, Employee's National Insurance Contributions, plus any other kind of allowance or deduction (such as Pension Scheme Contribution, Student Loan Repayment, etc.)
<b>Equal Opportunities</b>	Contains: Person's Ethnic Origin, Nationality, Disability indicator, First Aider indicator, Notes on the person's health details and HESA information (held within "User Fields").
<b>Employment</b>	Contains: Original Start Date (when first held a post at the University), Current Start Date (when started in current post),

<b>Detail</b>	Termination date (if relevant), Notice Period and Service History (held in the “Service Breaks” button).
<b>Employee Post Holding History</b>	<p>Lists all posts (past and present) that the person has held at the university. This includes paid posts, visitor posts, pensioner posts, etc.</p> <p>You can window-in to the summary button on any of the rows to view full details.</p>
<b>Employee Post Holding Costing</b>	Contains information about which Cost Centre(s) (Sub Project Code) is funding each particular post.
<b>Employee Basic Pay Details</b>	Contains information about which Pay Group the person is in (Main Payroll, Casual, Pensioner, etc.), their Pay Method, the Period when they were last paid, the Suspended indicator and Financial Institute Details (which holds the employee’s bank details).
<b>Employee Temporary Pay Elements</b>	Shows information relating to any Temporary (i.e. non-regular) Pay Elements, such as a one-off pay bonus for example.
<b>Employee Holiday Entitlement</b>	<p>Shows information relating to how much annual leave the person is entitled to.</p> <p>Each annual leave year (running from 1<sup>st</sup> October to 31<sup>st</sup> September) will be on its own line.</p>
<b>Asset Management</b>	Lists any assets that this person has recorded against them (such as a laptop, uniform, etc.)
<b>Employee Work Permits</b>	Records Work Permit and / or Visa information for employees where relevant.
<b>Employee Contract Details</b>	This screen will only have information in it if the person holds a Fixed Term Contract at the University. In this case you will be able to see how many extensions they have had.
<b>Employee Current Post Holding</b>	<p>Lists all present posts that the person holds at the university. This includes paid posts, visitor posts, pensioner posts, etc.</p> <p>You can window-in to the summary button on any of the rows to view full details.</p>
<b>Employee Tax Code and P45 Details</b>	Contains the person’s Tax Code information

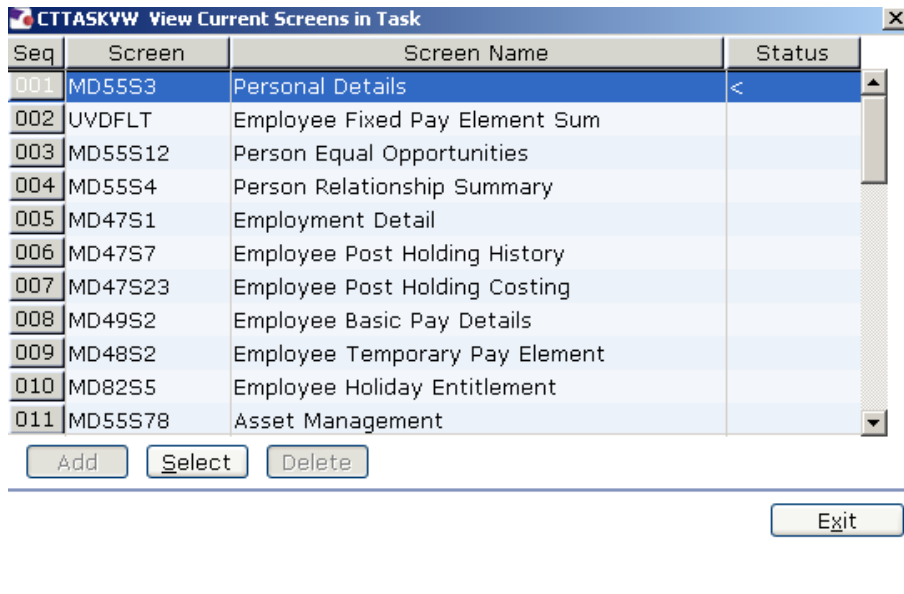
<b>Employee National Insurance Details</b>	Contains the person's National Insurance information
<b>Research Activity Survey</b>	Contains whether the person is a Research Assistant, a Research Fellow or has their work Peer Reviewed.
<b>Person Overall Qualifications</b>	Contains information about the person's Overall Qualification Standard (Doctorate, Diploma, A-Level, etc.)
<b>Employee Absence Details</b>	Shows absence details recorded for this person
<b>Employee Absence Calendar</b>	This calendar will show any absence that has been recorded for this person via the Employee Absence Details screen.
<b>Employee Maternity Details</b>	Details relating to an employee's maternity details.
<b>Employee OSP Details</b>	Completed by Payroll. This screen is for monitoring long-term sickness and shows whether a member of staff is still on full pay, half pay or is receiving no pay.
<b>Paternity and Adoption</b>	Details relating to an employee's paternity or adoption leave.
<b>General MyView Parameters</b>	Details about which MyView profile the person has been set up on. This is also where you can re-set MyView access passwords.

There are a couple of other useful features which you might like to use when viewing information through the All Screens task:

- the **Screens**  button
- the **Text Summary**

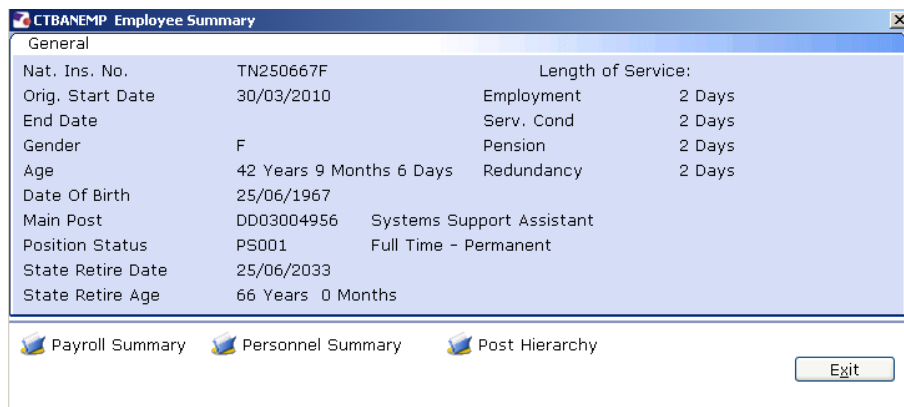


- 2.2 If you are using the All Screens task and know that you just want to view one particular screen, such as the person's absence record, for example, then you can click on the **Screens** button on the left-hand button bar and a list of all of the screens available will appear.



2.3 Then simply scroll down the list until you find the particular screen you wish to view, then click on that line and that particular screen will open.

2.4 The **Text Summary** button, also on the left-hand side button bar, provides a quick overview of the person's record:





Within this Employee Summary screen there are three buttons (along the bottom of the screen), which provide further information about:

- the person's payroll data (the **Payroll Summary** button),
- personnel information (**Personnel Summary** button), and
- information about where this person's post sits within the overall university hierarchy (**Post Hierarchy** button)

2.5 When you have finished using the **All Screens** task, click on **Save** if you have made any changes to the record, or **Cancel** if you have not changed anything.

- ❗ If you have selected someone using the person work list, remember to de-select them by double clicking on them (so that the tick disappears from over the person icon).

 Employee

ID	Name
 2074516	MS L LASTIC

- 2.6 To view another employee in the **All Screens** task, either click on the **All Screens** task or use **FIND** to search for another employee.